



April 7, 2013

Dear Respondent,

The City of Leon Valley is seeking an Insurance Agent of Record for the city's employee group health insurance program. The City of Leon Valley employee's one-hundred and five (105) full-time regular employees that are covered under our health, dental, and life, insurance benefit programs.

We appreciate your interest in replying to the City of Leon Valley's request for proposals for Insurance Agent of Record. Enclosed is the Request for Proposals packet, which outlines the following:

1. Overview
2. Scope of Services
3. Request for Proposals Submission Requirements
4. Request for Proposal Evaluation
5. Deliverables
6. Other Attachments include CIQ Information and Selection Process

To ensure the proper processing of your proposal please submit a *complete* proposal to the HR Office at 6400 El Verde Rd, Leon Valley, TX 78238 by 5:00 p.m., Monday, April 29, 2013. The City of Leon Valley reserves the right to reject any and all responses.

Sincerely,

Crystal Caldera
Human Resources Director
6400 El Verde Rd
Leon Valley, Texas 78238-2399
Tele: 210.684.1391 ext 212
Fax: 210.684.1515
c.caldera@leonvalleytexas.gov

City of Leon Valley Request for Proposals (RFP) Insurance Agent of Record

I. Overview

The City of Leon Valley is seeking an **Agent of Record** for in-group healthcare cost management for its group Life, Medical, and Dental.

The purpose of this request for proposal process is to secure the services of an independent **Agent of Record** to assist the City in the overall management of its insurance employee benefits program.

II. Scope of Services

The Agent of Record responsibilities include, but are not limited to the following:

- A. Providing the leadership skills necessary to take advantage of effective products and services developed by the industry.
- B. Preparation of Bid specifications, handle the negotiations for all renewals, analysis of Bids received and negotiate with the carriers to obtain best contractual terms and rates possible for the City.
- C. Assist the City with fiscal budget and premium funding projections.
- D. Provide the City with overall plan management and quality assurances services in plan administration, benefit design, customer service, cost containment and regulatory compliance – Patient Protection & Affordable Health Care Act.
- E. Provide ongoing, day-to-day service activities necessary to assure overall plan satisfaction. This includes employee intervention and on site trouble-shooting an enrollment assistance with the employees.

III. Request for Proposal Submission Requirements

- A. A brief statement as to why the consultant is uniquely qualified to provide services to the City of Leon Valley.
- B. Address the issue of staff availability for servicing the City. It is essential that the Agent of Record be available to the City whenever necessary.
- C. Provide a list of three (3) current group health clients at least (2) must be public entities or municipalities. Please indicate those clients that are public entities. Provide contact name, phone number, number of employees and how long you have had them as a client.
- D. Provide a list of three (3) group health clients that no longer utilize your services. Please indicate those clients that are public entities. Provide contact name, phone number, number of employees and how long you have had them as a client.

- E. If available, provide letters of recommendations from past and or existing clients.
- F. Complete CIQ (Conflict of Interest Questionnaire).
- G. Résumé
- H. An explanation of how the city will compensate you for your services.

IV. Request for Proposal Evaluation

Proposals will be evaluated utilizing the criteria summarized below:

- A. Content, technical approach and understanding of the scope of the project.
- B. Qualifications and prior experience in providing similar services.
- C. Overall project design and methodology.

V. Deliverables

Nine (9) copies of the response to this request shall be provided for review and must be valid for a minimum of sixty (60) days following submission. RFP must be received by the City of Leon Valley no later than 5:00 p.m. on Monday, April 29, 2013. Mail or deliver RFP to:

Crystal Caldera, Human Resources Director
City of Leon Valley
6400 El Verde Rd.
Leon Valley, TX 78238

The agent of record must always put the City of Leon Valley's interests first and may not knowingly or intentionally make decisions regarding the city based on personal pecuniary interest.

Any questions may be directed to Crystal Caldera at c.caldera@leonvalleytexas.gov or at 210- 684-1391, ext. 212.

The City of Leon Valley reserves the right to reject any or all responses.

**Please provide an answer to proposal section III. H;
“An explanation of how the city will compensate you for your services”.
Please answer the following:**

- 1) How will you be compensated for your services? If you are being compensated by commission, who pays your commission and what is your rate?

- 2) Is there any other monetary or non-monetary compensation for your services, if you are named the City of Leon Valley's Agent of Record for the employer provided employee group health plan?



CITY COUNCIL & CITY OFFICIALS

❖ **Conflict of interest Questionnaire (CIQ FORM) Visit:**
<http://www.ethics.state.tx.us/forms/CIQ.pdf>

City Council Members

**Chris Riley
Kathy Hill
Art Reyna, Jr.
Irene Baldrige
Jack Dean
Paul Bevier**

**Mayor
Council Place 1
Council Place 2
Council Place 3
Council Place 4
Council Place 5**

Staff Members

**Manuel Longoria Jr.
Janie Willman
Vickie Wallace
Randal Wallace
Luiz Valdez
Byron Vick
Kristie Flores**

**Joyce Trent
Claudia Mora**

Crystal Caldera

**Law Offices of Wm. M. McKamie
Michelle Lanfear
Lawrence G. Morales
Edmund Phillips**

**City Manager
City Secretary
City Accountant
Chief of Police
Interim Fire Chief
Public Works Director
Community
Development Director
Library Director
Economic Development
Director
Human Resources
Director**

**City Attorney
City Prosecutor
Municipal Court Judge
Municipal Court Judge**

Process for Selection of Insurance Agent of Record

Phase 1 Bid Solicitation April 7 -29, 2013

Phase 2

A. Scope of Services & Submission Requirements- Maximum 31 points

Services

- Providing the leadership skills necessary to take advantage of effective products and services developed by the industry. Max 3 pts
- Preparation of Bid specifications, handle the negotiations for all renewals, analysis of Bids received and negotiate with the carriers to obtain best contractual terms and rates possible for the City. Max 3 pts
- Assist the City with fiscal budget and premium funding projections. Max 3 pts
- Provide the City with overall plan management and quality assurances services in plan administration, benefit design, customer service, cost containment and regulatory compliance-Patient Protection & Affordable Health Care Act. Max 3 pts
- Provide ongoing, day-to-day service activities necessary to assure overall plan satisfaction. This includes employee intervention and on site trouble-shooting an enrollment assistance with the employees. Max 3 pts

Requirements

- A brief statement as to why the consultant is uniquely qualified to provide services to the City of Leon Valley. Max 2pts
- Address the issue of staff availability for servicing the City. It is essential that the Agent of Record be available to the City whenever necessary. Max 2pts
- Provide a list of three (3) current group health clients at least (2) must be public entities or municipal. Please indicate those clients that are public entities. Provide contact name, phone number, number of employees and how long you have had them as a client. Max 2pts
- Provide a list of three (3) group health clients that no longer utilize your services. Please indicate those clients that are public entities. Provide contact name, phone number, number of employees and how long you have had them as a client. Max 2pts
- If available, provide letters of recommendations from past and or existing clients. Max 2pts
- Complete attached form CIQ (Conflict of Interest Questionnaire). Max 2pts
- Résumé of the person that will be designated to the city of Leon Valley. Max 2pts
- An explanation of how the city will compensate you for your services. Max 2pts

Phase 3

B. Committee Matrix - Maximum 25 points

- Price or percentage of premium Max 5 points
- Years of experience of the Rep that will be working directly with has with municipalities Max 10 points
- The number of cities the company has with current clients - Max 10pt

Phase 4

C. **Oral Interview Maximum 35 points**

- Focusing on Patient Protection & Affordable Health Care Act

D. **References Maximum 9 points**

- Check three municipality/public Entity references -3 pts for each city.

Phase 5 Recommendation to City Council- May 21, 2013